



# **Replacement Project Management System Contract**

## **Invitation to Tender**

**CA18/05334**

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## Introduction

The Coal Authority (*Authority*) was established by Parliament to undertake specific statutory duties, set out in the Coal Industry Act 1994, associated with licensing coal mining operations; managing property and the historic legacy arising from the ownership of the coal reserves and underground workings; settling subsidence damage claims not falling on coal mine operators and providing access to coal mining information.

The Coal Authority has a legal duty under the Coal Mining Subsidence Act 1991, to repair properties damaged by coal mining subsidence in the five coalfield regions. The works are funded by grant in aid from central government, in order that the Coal Authority can discharge its statutory duty.

The Coal Authority employs 350, based mainly at the head office in Mansfield with some field staff remotely based in order to enable a fast response to incidents in the coal mining areas.

The Coal Authority is funded by grant in aid from the Department of Energy Security and Net Zero (DESNZ).

By virtue of the Coal Industry Act 1994, the Authority is required to have a regard for the need to secure the safety of members of the public throughout the coalfield regions of Great Britain. Safety may be threatened by the occurrence of former coal mining related surface hazard incidents which may relate to collapses of ground, fissures, coal mine workings or mine entries, emissions of gas or water, combustion of in-situ coal and combustion or instability of any spoil heaps in the Authority's ownership.

We take pride in our achievements, quality and motivation of staff and are focused on delivering high-level objectives and works to the following mission, purpose and values;

**Mission** Making a better future for people and the environment in mining areas

**Purpose** keep people safe and provide peace of mind, protect and enhance the environment, use our information and expertise to help people make informed decisions, create value and minimise cost to the taxpayer.

### Values

- |                    |   |
|--------------------|---|
| <b>Trusted</b>     | we act with integrity, we're open and transparent, we deliver on our commitments  |
| <b>Inclusive</b>   | we promote a culture of mutual respect, we recognise that our differences make us stronger, we work with others to achieve our vision |
| <b>Progressive</b> | we're open-minded and innovative, we recognise that the past can help us shape the future, we listen and learn                        |

## Invitation

Project Web App (PWA) or MS Project Server was installed in 2013 and is used for project and programme management and capacity planning throughout the Authority.

In the last ten years we have seen an increase in our project and programme management maturity level, and understand that our current software and ability to administer it is a limiting factor in our development. As part of our continuous improvement journey, we need a tool and the capability to manage our own configuration of it, in parallel with our process improvements, to enable us to be fit for the future.

Additionally since 2018 extended support for the system has been provided though we are aware that formal end of support for the software is in April 2023. Due to limited available options as well as to mitigate the risk of utilising unsupported software and to ensure we are fit for the future, the Authority is looking to identify a service provider that is able to achieve the following four outline scopes of requirement:

- Deployment and implementation of the new project and programme management software to replace the Authority's current Microsoft in PWA software. This being Microsoft Project Online.
- Migration of the existing data set under PWA
- To provide initial and then ongoing training and support including any system changes and development throughout the life of the contract
- To provide ongoing service management and maintenance of the replacement system

The services required is detailed within the Replacement Project Management Specification and associated documents, tenderers are advised to read and consider all aspects of the tender documents before preparing your tender submission. The aim of the documents is to outline the minimum technical and performance levels required by the Coal Authority should your organisation be awarded a contract.

The instruction and guidance as provided in this document are designed to ensure that all tenderers are given equal and fair consideration. It is therefore important that you provide all the information asked for and in the format and order specified.

Tenderers shall be deemed to have examined fully, at the time of tendering, the tender documents and it is the responsibility of tenderers to ensure that submissions are accurate and as they intend. The Coal Authority will not ensure that bids are complete or correct, or allow omitted material to be submitted after the tender deadline should any errors occur.

Tenderers shall bring any ambiguities and inconsistencies to the attention of the Procurement Business Partner (see page 7) during the period allowed for tendering, otherwise it shall be

accepted that all items in the tender documents have been understood and accepted for the purpose of submitting bids.

No unauthorised alteration, addition or removal shall be made to the tender documents. If any such alteration, addition or removal is made, or if the Commercial offer – Pricing Schedule is not duly completed, or if these instructions are not fully complied with the tender may be rejected.

All information is given by the Coal Authority as a guide and in good faith at the tender stage. However this information may change due to reasons beyond the control of the Coal Authority and no claim for additional costs shall be made by the successful tenderer if quantities or requirements subsequently differ.

It is intended that the procurement process will take place in accordance with the provisions of this ITT but the Coal Authority reserves the right to terminate, suspend, amend or vary this procurement process by notice to all potential tenderers in writing.

The Coal Authority will have no liability for any losses, costs or expenses caused to tenderers as a result of such termination, suspension, amendment or variation.

## **Software Demonstrations**

We shall be holding software demonstrations as part of our evaluations as laid out in the timeline below so tenderers can get a better understanding of the software and raise questions to assist with their evaluations.

Demonstrations are to take the form of a virtual live demonstration using screen-sharing and video. Tenderers will be contacted to arrange the demonstrations through the portal.

Please note that the scenarios to demonstrate, usability criteria and glossary are included in the Replacement Project Management System Scenario Scoresheet document so that tenderers are able to prepare accordingly subject to the necessary requirements being met.

The Coal Authority accepts no liability for any costs incurred by tenderers in respect of software demonstrations

## **Conditions of Contract**

Tenderers are to note that Services will be undertaken in accordance with Authority Terms and Conditions - V1 Contract for Supply of Services £20k - £100k

## Tender Documents

The following documents are included as part of this tender exercise to assist with your bid.

Document Name	
Invitation to Tender	Read
Contract Conditions	Read
Price Schedule	Read/Complete/Return
Replacement Project Management System Specification	Read
Authority Requirements	Read
Quality Assessment (aside from those listed below)	Read/Complete/Return
Quality Assessment: Functional Requirements	Read/Complete/Return
Quality Assessment: Service Management Requirements	Read/Complete/Return
Quality Assessment: Scenarios and System Usability	Read
Information Security Requirement (when requested)	Read/Complete/Return
Non Functional Requirements (when requested)	Read/Complete/Return

### Replacement Project Management System Specification:

This document provides further detail on the outline scope of requirement provided in the “background” above.

### Authority Requirements:

This document outlines the additional requirements both from a service provider and Authority perspective as to how the contract will be managed throughout the life of the contract.

## Programme for delivery

Phase	Process	Date
Tender	Invitation to Tender published	09:00am 1 <sup>st</sup> September 2023
	Deadline for queries	16:00pm 22 <sup>nd</sup> September 2023
	Tender closing date	16:00pm 2 <sup>nd</sup> October 2023
Assessment	Selection Criteria / Scoring	3 <sup>rd</sup> October 2023 – 3 <sup>rd</sup> November 2023
	Software Demonstrations	W/c 9 <sup>th</sup> – 27 <sup>th</sup> October 2023
Award	Award notification & Standstill*	15 <sup>th</sup> – 28 <sup>th</sup> November 2023
	Contract Commencement	28 <sup>th</sup> November 2023

\* Any changes will be notified as appropriate throughout the procurement process.

## Procurement procedure / Tender Return

The Authority as a Non Departmental Public Body is required to undertake this process in compliance with the Public Contracts Regulations 2015.

The process will be managed through the Coal Authority's eTendering portal, which provides a secure delivery mechanism and an auditable record of the process.

Tenders must be completed and submitted electronically through the InBye e-tendering portal by the due date and time.

**Completed tenders** must be uploaded by **16:00 hours on Monday 02 October 2023** to be considered for evaluation. The portal will automatically close at **16:00** hours any documents uploaded into the system after this time will be deemed late and will not be accepted.

Any questions related to the tender opportunity should be addressed in writing and sent to Procurement via the e-Tendering portal using the messaging facility within the system. This ensures that a complete audit trail of the process is achieved. Questions raised which result in additional information being provided will be shared with all tenderers together with the Authority's response, but will not breach any areas of commercially sensitive information.

**Questions** must be received no later **16:00 on Friday** than **22<sup>nd</sup> September 2023**. Questions received after this time will not be answered.

If you wish to discuss this tender please contact Joe Keir (Procurement Business Partner) on 01623 637410 who will assist you throughout the process.

## Confirmation of award

A contract award notification will be sent (subject to contract) to the successful tenderer by the date stated in the table programme for delivery. The unsuccessful tenderers will also be notified of the outcome at the same time.

## Tender assessment selection criteria / scoring

The tender evaluation will be based on the technical and financial proposals within the bids and the information set out in each compliant bid.

- Tenderers must accept the Coal Authority's terms and conditions.
- The Coal Authority will reject any bid, which is not a compliant bid.

A bid shall only be a compliant if the following documents have been completed and submitted:

- Selection Questionnaire – completed in the InBye e-portal.
- Technical & Professional questionnaire and responses - completed in the InBye e-portal
- Commercial offer –Price Schedule

Tenderers should ensure they allow sufficient time to prepare their bids allowing plenty of time for the closing date and time.

The Evaluation of the ITT responses will be carried out as per the table below. These elements will be assessed on a minimum 'meets requirements' basis.

The Coal Authority reserves the right to exclude any bid that does not meet the minimum requirements for these elements.

The Coal Authority will exclude a bid from this process if it establishes that the economic operator has been convicted of any of the offences defined in Regulation 57 of the Public Contract Regulations 2015.

Bids meeting requirements will then be evaluated on the basis of the most economically advantageous tender. The weighting to be applied to scoring questions within the tender will be as follows:

Stage 1	Weighting	All Tenderers
Commercial offer	30%	<p>The total costs for each tenderer will be calculated and a score out of 100 is awarded based on the percentage difference from the lowest bid received.</p> <p>Any tender where the submitted price is exceptionally low, i.e. 20% (or more) lower than the next lowest price, the relevant tenderer shall be requested to explain the basis of its tender price, which request, without limiting its scope, may include the requirement to provide some or all of the information stated in Regulation 69 (1) (2) (a) - (f) of the Public Contracts Regulations 2015. If the explanation is not considered adequate the tender may be rejected.</p>
Stage 2		All Tenderers
Technical Assessment	70%	<p>Tenders will be assessed to ascertain the tenderer's ability to meet the technical requirements and will be scored in line with the 'Marking Criteria' below and a score out of 100 is awarded based on the percentage difference from the highest quality points received.</p> <p>Each question will be individually scored and weighted to enable the impact of the importance of each aspect to this Tender.</p> <p>Software Demonstrations: Tenderers will be contacted to schedule their software demonstrations after submissions have been received and once the initial review of tenders such as a review of the tender questionnaire have been completed and passed.</p>
Stage 3		
Due Diligence		During the evaluation process tenderer's may be asked to attend a clarification interview on their written responses, depending on the responses received panel scores may stay the same or be adjusted up or down.
Stage 4		Preferred Tenderer



Contract Award		A contract may be awarded to the tenderer who meets all specified requirements and with the highest overall score.
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## Technical Assessment

Points are available based on the weighting for each of the elements to achieve a maximum of 70% of the evaluation process.

A point score for each element is achieved using the following equation.

$$\frac{\text{Points Weighting (\%)} \times \text{tenderer score}}{5 \text{ (maximum score)}} = \text{tenderers point award}$$

Subsequent submissions will be scored against this using the following equation:

$$\frac{\text{Tenderer's total points awarded}}{\text{Highest total points awarded}} \times 70 = \text{Tenderer's score}$$

## Submission of tender

Your tender should remain open for acceptance for a period of six calendar months from the closing date for the receipt of tenders and remain firm and fixed for this period.

Tenders received after the tender closing date will not be considered. Failure to comply with the provisions of these Instructions or to complete the tender document in full and without alteration may also result in the disqualification of your tender.

Your submitted tender rates and prices must be exclusive of value added tax.

NB "Tenderers" submissions will be evaluated as follows;

Evaluation of your Bid is a one or two stage process depending on your Price.

Firstly, no matter what your Price, Your Bid must be Compliant with the Coal Authority's Criteria as outlined within this document. It is then treated as a Compliant Submission. The Coal Authority will then proceed to award a score for Price, the first stage, using the criteria outlined in the Tender documentation.

BUT

1. "If your Bid is Compliant, the Coal Authority may choose not to assess your Bid further where your Price is so High that it is not feasible for your bid to win the Tender because of your Price i.e. your Price is so high as to result in your Bid being Uncompetitive and unable to win the Tender on the basis of being the most Economically Advantageous, because of Price."
2. "Bids that ARE Competitive on Price will be taken to the second stage, as they will be regarded as Competitive Bids. The Competitive Bid with the highest overall score for both Price and technical will be the preferred Bid".

3. Before awarding a contract on the basis of price, the Coal Authority will consider whether the Lead Tenderers' score is abnormally low in relation to the Works and Services. If such bid appears to be abnormally low, in the opinion of the Coal Authority, the Coal Authority will request that the Lead tenderer explains the price of its tender in accordance with Regulation 69 of the Public Contracts Regulations 2015.
4. If at any stage any bid is withdrawn or removed from the assessment by the Coal Authority which affects the Price assessment, the Coal Authority will recalculate the Price scores and reconsider whether any bids which originally did not progress to stage two, subsequently need to be assessed.

## **Technical assessment**

Please ensure that all questions are completed in full, and in the format requested. Failure to do so may result in your submission being disqualified.

We will consider all applications submitted in accordance with the instructions set out within the tender documentation and evaluate all tenders on the quality questionnaire and prices offered. We may seek clarification where necessary and will determine to our satisfaction that the most economically advantageous tenderer is qualified to perform the contract satisfactorily and is financially viable.

## **Technical Envelope – Technical and Professional Ability -70%**

The questions included within this section will be evaluated at 100% of the overall assessment criteria, at the weighting given to each question.

Question	Weight	Question	High Scoring Response
1. Functional Requirements	15% of available quality marks	<p>Please review and respond to each of the requirements listed in the functional requirements document (see attachments in the Portal)</p> <p>This document catalogues the functional requirements expected of the new system.</p> <p>For each requirement, please complete the 'Supplier Response' column by selecting one of the following:</p> <ul style="list-style-type: none"> <li>- Not met</li> <li>- Partially met</li> <li>- Fully met</li> </ul> <p>Please provide evidence to support your assessment in the 'Supplier Comments' column. Any response without supporting evidence will be considered as requirement not met.</p>	Suitably detailed responses with the inclusion of evidence where appropriate will increase the likelihood of a pass.
2. Scenarios & System Usability	15% of available quality marks	Those tenderers that meet the initial requirements of the tender such as review of the tender questionnaire which has been completed and passed will be invited to provide a live demonstration.	Suitably detailed demonstration of the functionality, including any related functionality that the tenderer can provide over and above that which has been specifically requested, will increase the likelihood of a high score.

Question	Weight	Question	High Scoring Response
		<p>Tenderers must not exclude any part of the scenario as listed within the “Replacement Project Management System Scenario Scoresheet”</p> <ul style="list-style-type: none"> <li>- Tenderers are expected to use the standard product/software to perform the demo and what is required for each scenario to be run effectively</li> <li>- Tenderers are expected to use their own appropriate test data for the demonstration</li> <li>- Where it is practical to do so tenderers should aim to link together results from one scenario to the next</li> </ul> <p>As part of the assessment the general look and feel of the system in regard to the system usability will be assessed as highlighted within the ‘Replacement Project Management System Scenario Spreadsheet’. (see attachments in the Portal)</p> <p><b><u>Demo sessions will be limited to 1hr 30mins, this includes timing for questions.</u></b></p>	<p>Usability along with the systems look and feel will be judged using the criteria listed in the Scenarios For Demonstration Tab.</p> <p>A high scoring response will demonstrate that all or nearly all of the criteria listed have been judged by those at the demonstrations to have been met. (See tab Cover Sheet &amp; Instructions’ in the Replacement Project Management System Scenario Scoresheet document for details of how this will be accessed).</p>
3. System Implementation	30% of available quality marks	Please provide an outline implementation plan for delivery, which includes a Gantt chart or similar that illustrates the timeline of your delivery of this requirement, if successful.	A detailed and credible plan for delivery within the timescales outlined in the procurement scope with specific

Question	Weight	Question	High Scoring Response
		<p>Within the outline implementation please confirm the details of the work that we as a client would be expected to complete to make for a successful implementation as well as what assumptions have been taken into consideration.</p> <p>The outline plan should include details of the testing programme and data migration of the existing data set that would be required if you were successful.</p> <p>Within your submission please also confirm the timing of the implementation, both start and finish dates.</p>	<p>commitments to timescales both for the system implementation and data migration proposal will score highly</p> <p>Inclusion of details that are clear about expectations of client involvement as well as a detailed and credible testing approach will also score highly.</p> <p>It is important to us that the system is implemented by 1<sup>st</sup> April 2024.</p>
4. Service Management including reporting and account management	10% of available quality marks	<p>Please review and respond to each of the requirements listed in the 'Replacement Project Management System Service Management Requirements'. (see attachments in the Portal)</p> <p>Note: This document should be read in conjunction with our Service Management document ('Service Management.docx'), (see attachments in the Portal)</p> <p>For each requirement, please complete the 'Supplier Response' column by selecting one of the following:</p> <ul style="list-style-type: none"> <li>- Not met</li> </ul>	<p>A high scoring response will demonstrate a high degree of compliance to the requirements. (See tab: 'Cover Sheet &amp; Instructions' in the requirements document for details of how responses will be scored).</p> <p>A detailed and credible customer service plan in support of your completion of the 'Service Management Requirements' which gives us confidence as well as a suitably experienced</p>

Question	Weight	Question	High Scoring Response
		<p>- Partially met</p> <p>- Fully met</p> <p>Please provide sufficient evidence to support your assessment in the 'Supplier Comments' column. Any response without sufficient supporting evidence will be considered as requirement not met.</p> <p>Please also include your proposed Customer service plan as part of your response. This is to support the 'Service Management.docx', but it will not be scored itself.</p> <p><b><u>Maximum 2 sides of A4</u></b></p>	<p>team that will be supporting this contract would be welcomed.</p>
5. Training and Support	20% of available quality marks	<p>Please outline what training and support will be offered and in line with the specification throughout the life of the contract.</p> <p>This should include but not limited to the number of days/hours provided each year and what the training delivery medium is.</p> <p>Please also outline the timescales to develop the training plan and how this will be delivered.</p> <p><b><u>Maximum 3 sides of A4.</u></b></p>	<p>A high scoring response will include detailed plans as to how training and support that reflect the needs of different roles will be provided, alongside accessible medium, e.g. guides and videos, throughout the life of the contract.</p> <p>The response will include clear timescales as to how the plan will be developed and then delivered.</p>

Question	Weight	Question	High Scoring Response
			Your response should be limited to, and focused on, each of the component parts of the question posed. You must not make generalised statements or give irrelevant information.
6. Social Value	5% of available quality marks	<p>Using a maximum of <u>2 sides of A4</u> please demonstrate how you currently and will support health and wellbeing, including physical and mental health, in the contract workforce that will be utilised in the delivery of service.</p> <p>Your answer must include a method statement, this should describe the commitments of your organisation for the above and how you will achieve this using the award criteria set out below. This should include how you will implement your commitments and how these will be monitored, measured and reported upon and the impacts these have had.</p> <p>We are also keen to know might work with the Coal Authority, through the delivery of this contract, to support our continuous efforts to improve the health and wellbeing of Coal Authority Staff.</p>	<p>A high scoring response will be one that tells us what existing and/or planned commitments, and plans the bidder has which:</p> <ul style="list-style-type: none"> <li>• Identify an understanding of issues relating to health and wellbeing, including physical and mental health, in the contract workforce.</li> <li>• Showcase inclusive and accessible recruitment practices, development practices and retention focussed activities including recruiting, managing and developing people with a disability or health condition.</li> <li>• Actions taken to invest in the physical and mental health and wellbeing of the contract workforce.</li> </ul>

Question	Weight	Question	High Scoring Response
		<p>Award criteria: You should include but is are not limited to detailing an:</p> <ul style="list-style-type: none"> <li>• timed action plan</li> <li>• use of metrics</li> <li>• tools/processes used to gather data</li> <li>• reporting</li> <li>• feedback and implementation</li> </ul> <p><b><u>Maximum 2 sides of A4.</u></b></p>	<ul style="list-style-type: none"> <li>• Methods to measure staff engagement over time and adapt to any changes in the results.</li> <li>• Processes for acting on issues identified.</li> </ul> <p>Your response should be limited to, and focused on, each of the component parts of the question posed. You must not make generalised statements or give irrelevant information.</p>
7. Sustainability	5% of available quality marks	<p>Using a maximum of 2 sides of A4 describe in a method statement the effective measures you have and/or will develop:</p> <ul style="list-style-type: none"> <li>• To ensure that environmental and social impacts are continually reducing over the lifecycle of the Contract</li> <li>• To deliver additional environmental benefits including working towards net zero greenhouse gas emissions</li> <li>• To influence staff, suppliers, customers and communities through the delivery of the Contract to support environmental and social awareness, protection and improvement</li> </ul>	<p>A high scoring response will be one that ensures that all areas outlined within the question are met, are well-structured, clear and demonstrate an understanding of the requirement.</p> <p>This includes but is not limited to detailing the relevant measures that are in place and what the frequency and how these are reviewed and measured. If the measures are to be</p>



Question	Weight	Question	High Scoring Response
		<p>This shall be in consideration and include but is not limited to how you will meet the sustainability requirements as laid out under the “specification” including sustainable data management.</p> <p><b><u>Maximum 2 sides of A4.</u></b></p>	<p>developed, in addition to the above it would be welcomed to have the indicative timeline as to when these measures would be in place.</p> <p>Your response should be limited to, and focused on, each of the component parts of the question posed. You must not make generalised statements or give irrelevant information.</p>
8. Information Security	(Pass/Fail)	<p>Please review and respond to each of the requirements in the ‘Replacement Project Management System Information Security Questionnaire document’ (see attachments in the Portal)</p> <p>As described in the document, each response will be assessed using a RAG system. Your responses to all requirements will be considered as a collective before determining a pass or fail.</p> <p>Where a response is not an instant pass, the Authority may seek clarification from tenderers to ensure the requirements are understood and whether mitigating controls are in place.</p> <p>The Authority reserves the right to exclude any submission that is determined to be a fail for this question.</p>	<p>Suitably detailed responses with the inclusion of evidence where appropriate will increase the likelihood of a pass.</p>

Question	Weight	Question	High Scoring Response
9. Technical non-functional requirements	(Pass/Fail)	<p>Please review and respond to each of the non-functional requirements in the 'Replacement Project Management System Technical Non-Functional Requirements' (see attachments in the Portal)</p> <p>As described in the document, each response will be assessed using a RAG system. Your responses to all requirements will be considered collectively before determining a pass or fail.</p> <p>Where a response is not initially determined to represent an instant pass, the Authority may seek clarification from bidders to ensure the requirements are understood and whether mitigating controls are in place.</p> <p>The Authority reserves the right to exclude any submission that is determined to be a fail for this question.</p>	Suitably detailed responses with the inclusion of evidence where appropriate will increase the likelihood of a pass.

## Information Security Requirements

Being a Government organisation, Information Security is of paramount importance to us, hence we include a detailed Information Security questionnaire as part of our due diligence process. The Questionnaire will only be requested to be completed with the preferred tenderer who offers the most economically advantageous tender based on the price and quality scoring assessment.

As outlined within the questionnaire, if the requirements cannot be met by the preferred tenderer, the bid will be considered as non-compliant and will not be progressed further. If this is the case, the request for the completion of the questionnaire will then progress to second most economically advantageous tender and will continue to follow this process until the questionnaire has been passed.

For clarity, the Replacement Project Management System Information Security Questionnaire does not need to be completed upfront by the tenderers and instead will be requested to be completed with the preferred tenderer towards the end of the evaluation process.

## Non-functional Requirements

We have defined a set of non-functional requirements to catalogue the various requirements that the application must be able to deliver. These include but are not limited to areas such as capacity, performance, scalability and accessibility of the system.

Extent to which tenderers are able to meet these non-functional requirements will be assessed. Instructions on how to complete and how the document will be assessed are laid out within the "Replacement Project Management System – Non-Functional Requirements" document.

The Non-functional requirements will only be requested to be completed with the preferred tenderer who offers the most economically advantageous tender based on the price and quality scoring assessment, as part of our due diligence process.

As outlined within the spreadsheet, if the requirements cannot be met by the preferred tenderer, the bid will be considered as non-compliant and will not be progressed further. If this is the case, the request for the completion of the non-functional requirements will then progress to second most economically advantageous tender and will continue to follow this process until the non-functional requirements have been passed.

For clarity, the Non-functional requirements does not need to be completed upfront by the tenderers and instead will be requested to be completed with the preferred tenderer towards the end of the evaluation process.

## Functional Requirements:

We have defined a set of functional requirements to bring focus to our core business needs and requirements. Extent to which tenderers are able to meet these functional requirements will be assessed. Instructions on how to complete and how the document will be assessed are laid out within the "Replacement Project Management System – Functional Requirements" document.

## Service Management Requirements

As outlined within the scope of requirements and specification we require both service desk and service management support, with a dedicated account manager. This is to ensure the continued adherence to service agreements and to maintain a positive on-going relationship with The Coal Authority as outlined within the "Replacement Project Management System Service Management Requirements". Instructions including assessment guidance is provided within the specified document.

## Scoring Criteria

Scoring questions are identified within the tender and the table below provides a summary of the scoring to be applied.

Score categories	Meaning	Scores
Adds value	Response demonstrates that as well as meeting requirements in all respects, the response is comprehensive and supported by relevant evidence, which is innovative and exceeds expectations, including a full description of techniques and measurements employed that benefit and adds value for the Coal Authority.	5
Meets requirements	Good response provided which meets the requirement and demonstrates how they will be delivered in all aspects to an acceptable standard.	4
Minor reservations	Satisfactory response provided which demonstrates the tenderer has the ability to meet the requirement but there are some minor reservations that could have been expanded upon.	3
Significant reservations	Response demonstrates the tenderer has the ability to partially meet the requirement, but with deficiencies apparent and generating significant concerns about the approach or solution proposed. The response falls short of minimum expectations and indicates lack of understanding of the contract requirements.	2
Requirements not met	Response fails to evidence that the tenderer understands the requirement. There are major reservations in respect of the approach, and/or the capability of delivering the requirements this could include no response to the question and/or no supporting evidence	0

Each question will be individually assessed. The Coal Authority reserves the right to deem any submission scoring a 0 for any scored question as non – compliant and as such may be excluded from consideration.

It is essential that questions are answered fully failure to do this may prevent the Authority's evaluation from being properly completed, and hence may lead to exclusion from this tender competition.

## Guidelines

The questionnaire should be completed by a partner/director/senior manager.

Please answer each question fully. The Coal Authority stresses the value and importance of substantiating answers with supporting documentation when requested.

The questionnaire should be completed accurately, if successful this document will form part of the contract.

The response and supporting documents must relate specifically to the organisations policy and arrangements.

Organisations currently providing services to the Coal Authority must provide full details as requested and not just refer to the Coal Authority.

Appendices in the form of attachments are either requested for the response to a specific question or can be included in the Supporting Documentation area within the questionnaire but where included must be clearly labelled and cross referenced to ensure the information supplied can be assessed in full.

## Assessment and feedback

The tender submissions will be assessed in accordance with selection criteria.

Feedback will be provided to tenderers, which are not successful through the issue of a letter, providing debrief information on the assessment of the tender, scoring and confirmation of the successful tenderer.

## Acceptance procedure

The Coal Authority does not bind itself to accept your tender and will not be responsible for, nor pay for, any expenses or losses which may be incurred by you in the preparation of your tender.

No tender shall be deemed to have been accepted unless such acceptance has been notified in writing to the tenderer.

Whether or not your tender is accepted, you must treat the details of all tender documents as private and confidential. If you decide not to submit a tender, you must reply that you wish to reject the tender and provide a comment why.

If you require clarification then a query through the online messaging facility should be submitted.

## Declaration

We declare that this is a bona fide tender, intended to be competitive, and that we have not fixed or adjusted the amount of the tender by or under or in accordance with any agreement or arrangement with any other person.

We also declare that we have not done and we undertake that we will not do at any time before the returnable date for this tender any of the following acts:-

- (a) communicate to a person other than the person calling for these tenders the amount or approximate amount of the proposed tender
- (b) enter into any agreement or arrangement with any other person that he shall refrain from tendering or as to the amount of any tender to be submitted
- (c) offer, pay or give or agree to pay or give any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other tender or proposed tender for the said work any act or thing of the sort described above

In this declaration the word 'person' includes any persons and any body or association, corporate or unincorporated; and 'any agreement or arrangement' includes any such transaction, formal or informal, and whether legally binding or not.

## Confidentiality and Information Risk Management

The Authority draws your attention to the following Conditions in respect of Confidentiality and Information Risk Management: Communications and Exchange of Information, Ownership of the Authority's drawings and documents, Confidentiality and Freedom of Information [Works & Services] Confidentiality and Ownership of documents and Freedom of Information[Consultancy] in respect of confidentiality to the information provided as part of this procurement process and throughout the provision of Services/Works under the Contract to be awarded as a result of this tender procedure. Should the Authority deem it necessary the tenderer may be required to complete its Confidentiality Agreement and/or its Data Handling Policy.

## Transparency Agenda

In accordance with the [Government's Transparency Agenda](#) the following information will be published on-line and further information can be found below under Transparency guidance.

- Publication of all individual payment transactions, this includes payments for goods and services i.e. invoice information
- All new tender documents for contracts over £30,000
- All new contracts over £30,000

Only limited exemption and redaction of information will be eligible which will need to satisfy Freedom of Information Act principles.

As provided within the e-tendering portal questionnaire, please outline information that you consider to be confidential and/or commercially sensitive in line with the provided definitions and interpretations within the Authority Terms and Conditions.

Please visit the Coal Authority's website ([gov.uk/coalauthority](http://gov.uk/coalauthority)), [data.gov.uk](http://data.gov.uk), [www.gov.uk/contracts-finder](http://www.gov.uk/contracts-finder) to see examples of information being published and find out more.

## Fraud Reporting

In keeping with our Counter Fraud vision; "Working together to find and stop fraud", we have a fraud reporting tool which can be accessed via our public facing website - [Fraud Reporting - Coal Authority \(groundstability.com\)](http://Fraud Reporting - Coal Authority (groundstability.com)). Should you be successful in contracting with the Coal Authority, we encourage you to share this with your teams that are working on those contracts.

## Transparency guidance

Government has set out the need for greater transparency across its operations to enable the public to hold public bodies and politicians to account. This includes commitments relating to public expenditure, intended to help achieve better value for money.

As part of the transparency agenda, government has made the following commitments with regard to procurement and contracting:

- all new central government ICT contracts over the value of £10,000 to be published in full online from July 2010
- all new central government tender documents for contracts over £10,000 to be published on a single website from September 2010, with this information to be made available to the public free of charge
- all new central government contracts over the value of £12,000 to be published in full from December 2022
- new items of sub-central contracting authorities spending over £30,000 to published online from December 2022

Suppliers and those organisations looking to bid for public sector contracts should be aware that if they are awarded a new government contract, the resulting contract between the supplier and Government will be published. In some circumstances, limited redactions will be made to some contracts before they are published in order to comply with existing law and for the protection of national security.

The publication of information incorporates but is not limited to the following documentation/ information. This will cover potential contract extensions and orders placed against a framework or term contract.

**Contracts:** contract, specification, terms and conditions, schedules and pricing – issued by both the tenderer and the Coal Authority

**Tenders:** invitation to tender, specification, terms and conditions, prequalification questionnaires, OJEU notices – issued by the Coal Authority

**Spending:** summary of invoice information in relation to payments made and includes invoice values – submitted by suppliers